Privacy Policy

This statement governs our privacy policies with respect to our Clients who conduct business with us as well as those who interview with us without becoming Clients.

"Personally Identifiable Information" refers to any information that identifies or can be used to identify, contact, or locate the person to whom such information pertains, including, but not limited to, name, address, phone number, fax number, email address, financial profiles, Social Security Number, or driver's license information.

What Personally Identifiable Information is collected? We collect all contact information, as well as governmental identification such as Social Security Numbers and driver's license information. We also collect net worth, income, employment information and other financial data pertinent to financial planning.

What organizations are collecting the information, and how do we use Personally Identifiable Information? Liftoff Financial Planning, LLC collects all information from you. We collect information required by the custodians of your investments (e.g. TD Ameritrade) and the information we are required to have by law by the relevant state and federal regulators. To the extent that you provide Liftoff Financial Planning, LLC with your email address, it may be added to Liftoff Financial Planning's electronic newsletter mailing list. You may opt out at any time by calling Liftoff Financial Planning, LLC Advisors at 208-840-0766.

With whom may the information be shared? The only parties with access to your Personally Identifiable Information are your custodian (e.g. TD Ameritrade) the third-party management systems Liftoff Financial Planning, LLC utilizes (e.g. XY Investment Solutions, RightCapital), the electronic newsletter program used, and Liftoff Financial Planning, LLC. We share your Personally Identifiable Information with no outside parties for any reason other than a direct request from you, our Client.

How is Personally Identifiable Information stored? Personally Identifiable Information is stored in a secure, encrypted cloud-based vault utilizing AES-256.

What happens if the Privacy Policy changes? The nature of the Financial Planning Industry calls for very high privacy standards for our Clients' information. If industry standards change in the future, we will contact our Clients before any changes are made.